DEFENSE CONTRACT MANAGEMENT AGENCY

DCMA

ACQUISITION INSIGHT GLOBAL ENGAGEMENT

Reports Training

September 2010

ITCSO Training Academy

TEACH IT • LEARN IT • USE IT

Course Topics

Note: Links will ***only*** work in PowerPoint's slide show view.

Module One	**Pre-Defined Reports**
Lesson One	**Overview Of Pre-Defined Reports**
Topic One	How to Access Pre-Defined Reports
Topic Two	Report Formats
Topic Three	Running Pre-Defined Reports

Course Objectives

At the end of the guide you should be able to:

- Access Pre-Defined Reports
- View Reports in Four Different formats
- Run Pre-Defined Reports

Module One

Pre-Defined Reports

Lesson One Topics

Topic One	How to Access Pre-Defined Reports
Topic Two	Report Formats
Topic Three	Running Pre-Defined Reports

Topic One – How to Access Pre-Defined Reports

There are two ways to access the eTools Reporting Interface:

Option 1 – Reports Portal

Once you have logged into eTools, the eTools Reporting Interface can be accessed by selecting the Reports link under the My Pages menu on the Portal page.

Please note that DSM 2.0 is only an example for this training.

How to open the eTools Reporting Interface from the Portal (Graphics 1.1.1.1 - 1.1.1.2)	
1.	*Click* on the **Reports** link in the My Pages navigation bar.
2.	*Click* on the **Application** icon you wish to access. • The eTool Reporting Interface will display

DEFENSE CONTRACT MANAGEMENT AGENCY
DCMA HELP DESK
DCMA HOME | ABOUT US | CUSTOMERS | EMPLOYEES | NEWS ROOM | eTOOLS | ATAAPS
eTools | Applications
My Pages
Home Page
eTools
Applications
Reports
Control Panel
eForms
Training/Help
Portal Development Communi...
Reference Library
Community Actions
Join Communities
Unsubscribe Communities
Edit Portlet Preferences
EARLYCAS Application
Additional Funds
Reporting mechanism for those contracts with an overage code 'N' in MOCAS.
Aircraft Operations
Tracks flight deliveries, approval, training and metrics (crew data, site data and flight data).
AT Level One
Allows DoD employees, contractors, and military personnel to successfully
Delegation
Request and manage prime reimbursable and non-reimbursable delegations and support delegations on a subcontract. Replaces ECARS and QA/PA.
Delivery Schedule Manager 2.0
To facilitate surveillance and analysis of contract delivery schedules, Delay Notifications, and Customer Requests.
District Customer Satisfaction Survey
Used by District staff to conduct and manage telephone surveys. Results are visible to the CMO involved, conduction survey, and DCMA HQ staff.
MOCAS Administration Module
Allows MOCAS Administrative personnel to update Tables 44 and 48, and to update ADRS records for both CAGEs and Contracts.
Modifications & Delivery Orders
Allows users to modify an existing contract or issue a delivery order.
NASA Quality Leading Indicator
Assess a supplier's facility using a common set of criteria to identify risk.

Graphic 1.1.1.1: eTools Reports Link

Delivery Schedule Manager
To facilitate surveillance and analysis of contract delivery schedules, Delay Notifications, and Customer Requests.

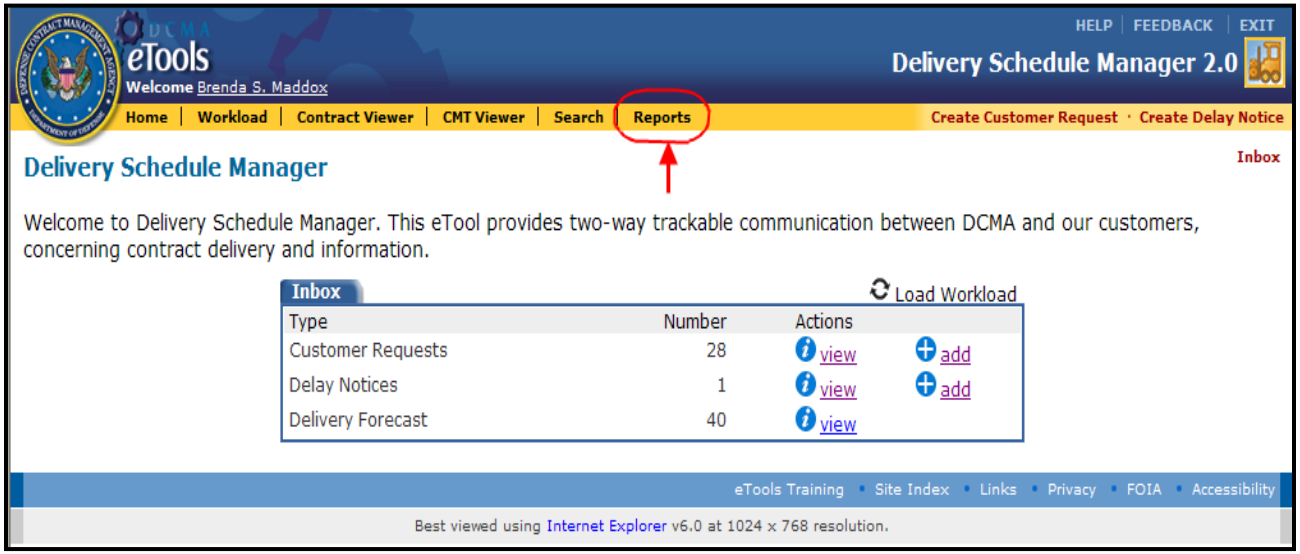
Graphic 1.1.1.2: Example: eTool Application Icon

Topic One – How to Access Pre-Defined Reports

Option 2 – eTools Application

From within the eTool application, the Reporting Interface can be accessed from any application screen using the Reports option in the application menu bar.

How to open the eTools Reporting Interface from an application (Graphic 1.1.1.3)	
1.	*Click* on the **Reports** link on the application menu bar. •The eTool Reporting Interface will display


HELP | FEEDBACK | EXIT
eTools
Welcome Brenda S. Maddox
Delivery Schedule Manager 2.0
Home | Workload | Contract Viewer | CMT Viewer | Search | Reports
Create Customer Request · Create Delay Notice
Inbox
Delivery Schedule Manager
Welcome to Delivery Schedule Manager. This eTool provides two-way trackable communication between DCMA and our customers, concerning contract delivery and information.
Inbox
Load Workload
Type
Number
Actions
Customer Requests 28 view add
Delay Notices 1 view add
Delivery Forecast 40 view
eTools Training • Site Index • Links • Privacy • FOIA • Accessibility
Best viewed using Internet Explorer v6.0 at 1024 x 768 resolution.

Graphic 1.1.1.3: Accessing Reports within an Application

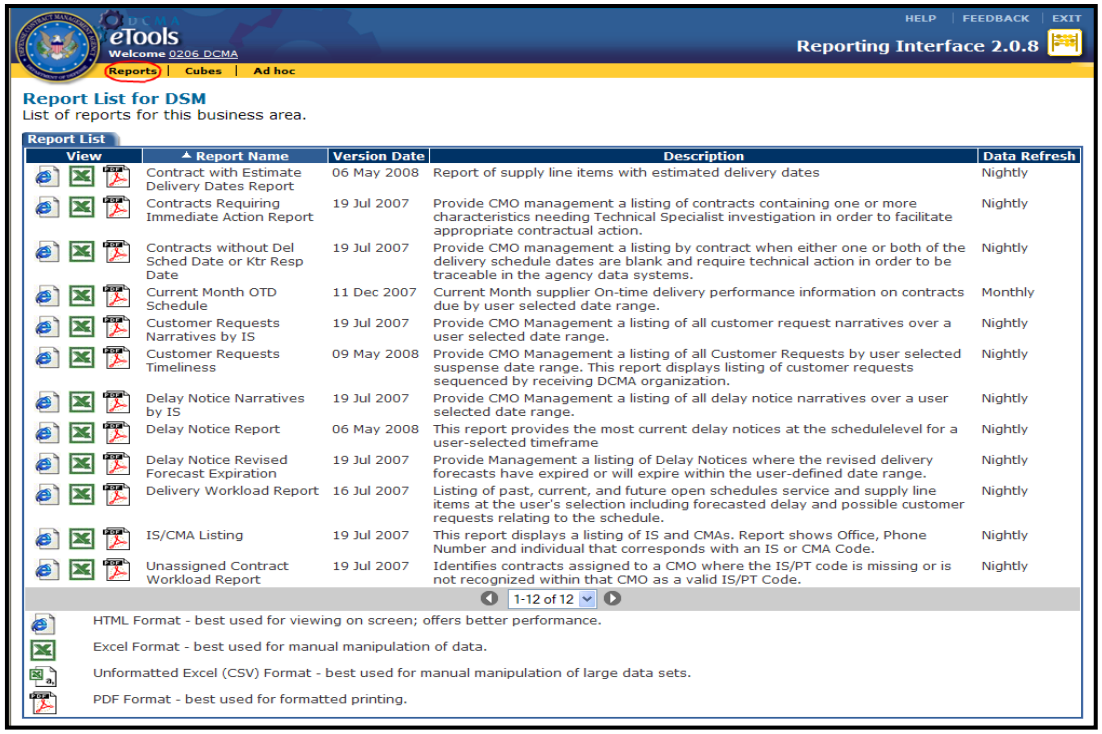
Topic Two – Report Formats

eTool Reporting Interface

You can view reports in any of the following four formats:

	HTML Format - best used for viewing on screen; offers better performance.
	Excel Format - best used for manual manipulation of data.
	Unformatted Excel (CSV) Format - best used for manual manipulation of large data sets.
	PDF Format - best used for formatted printing.

Table 1.1.2.1: Report Formats


eTools
Welcome 0206 DCMA
HELP | FEEDBACK | EXIT
Reporting Interface 2.0.8
Reports | Cubes | Ad hoc
Report List for DSM
List of reports for this business area.
Report List
View | Report Name | Version Date | Description | Data Refresh
Contract with Estimate Delivery Dates Report | 06 May 2008 | Report of supply line items with estimated delivery dates | Nightly
Contracts Requiring Immediate Action Report | 19 Jul 2007 | Provide CMO management a listing of contracts containing one or more characteristics needing Technical Specialist investigation in order to facilitate appropriate contractual action. | Nightly
Contracts without Del Sched Date or Ktr Resp Date | 19 Jul 2007 | Provide CMO management a listing by contract when either one or both of the delivery schedule dates are blank and require technical action in order to be traceable in the agency data systems. | Nightly
Current Month OTD Schedule | 11 Dec 2007 | Current Month supplier On-time delivery performance information on contracts due by user selected date range. | Monthly
Customer Requests Narratives by IS | 19 Jul 2007 | Provide CMO Management a listing of all customer request narratives over a user selected date range. | Nightly
Customer Requests Timeliness | 09 May 2008 | Provide CMO Management a listing of all Customer Requests by user selected suspense date range. This report displays listing of customer requests sequenced by receiving DCMA organization. | Nightly
Delay Notice Narratives by IS | 19 Jul 2007 | Provide CMO Management a listing of all delay notice narratives over a user selected date range. | Nightly
Delay Notice Report | 06 May 2008 | This report provides the most current delay notices at the schedulelevel for a user-selected timeframe | Nightly
Delay Notice Revised Forecast Expiration | 19 Jul 2007 | Provide Management a listing of Delay Notices where the revised delivery forecasts have expired or will expire within the user-defined date range. | Nightly
Delivery Workload Report | 16 Jul 2007 | Listing of past, current, and future open schedules service and supply line items at the user's selection including forecasted delay and possible customer requests relating to the schedule. | Nightly
IS/CMA Listing | 19 Jul 2007 | This report displays a listing of IS and CMAs. Report shows Office, Phone Number and individual that corresponds with an IS or CMA Code. | Nightly
Unassigned Contract Workload Report | 19 Jul 2007 | Identifies contracts assigned to a CMO where the IS/PT code is missing or is not recognized within that CMO as a valid IS/PT Code. | Nightly
1-12 of 12
HTML Format - best used for viewing on screen; offers better performance.
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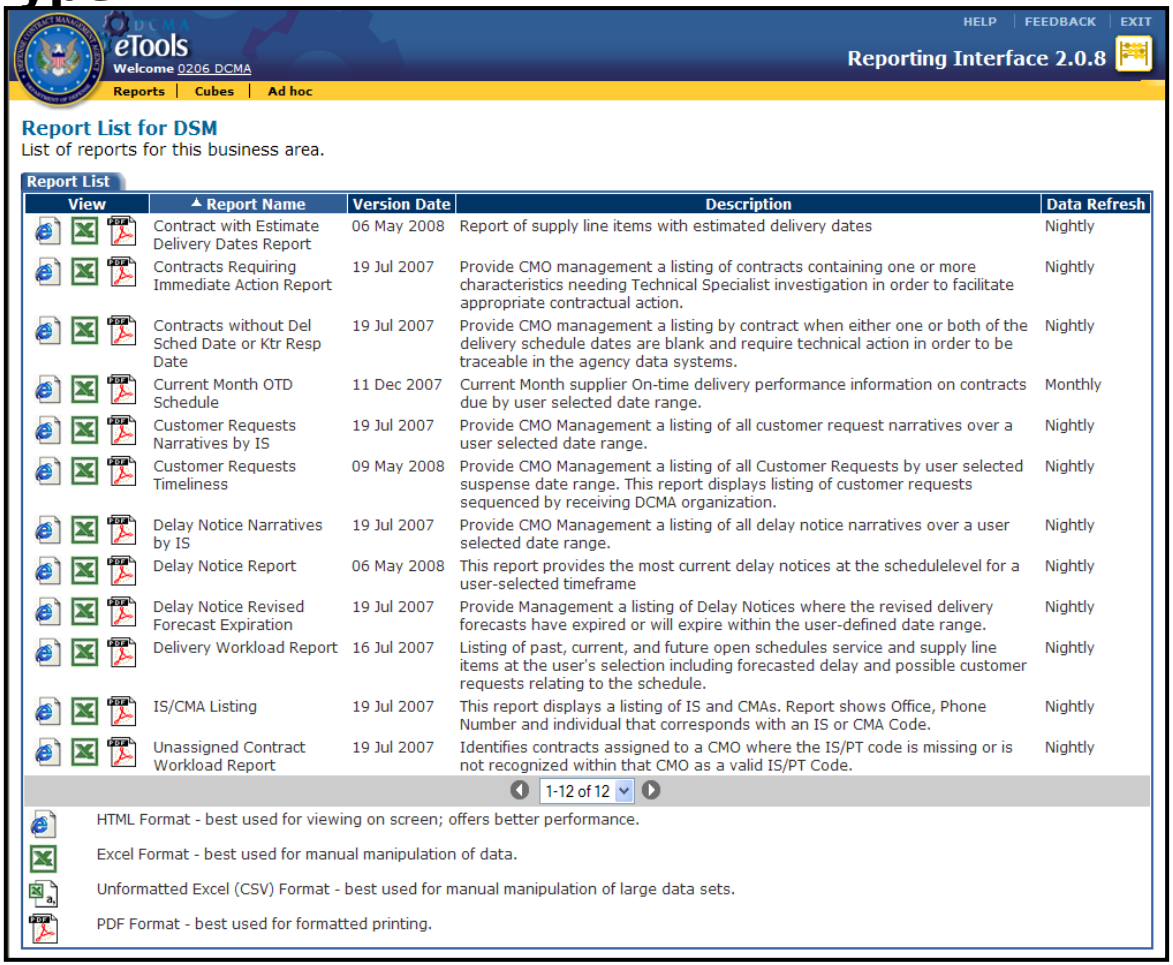
Graphic 1.1.2.1: Report List

Topic Three – Running Pre-Defined Reports

Select Report and Format Type

Locate the Report you want to access from the Report List.

Selecting the Report Format (Graphic 1.1.3.1)	
1.	*Click* th **HTML** button next to the report name. •The report will appear in HTML format
2.	*Click* the **PDF** button next to the report name. •The Reports will appear in PDF format
3.	*Click* th **Excel** button next to the report name. •The Reports will appear in Excel format •From Excel, the file can be saved in CSV format also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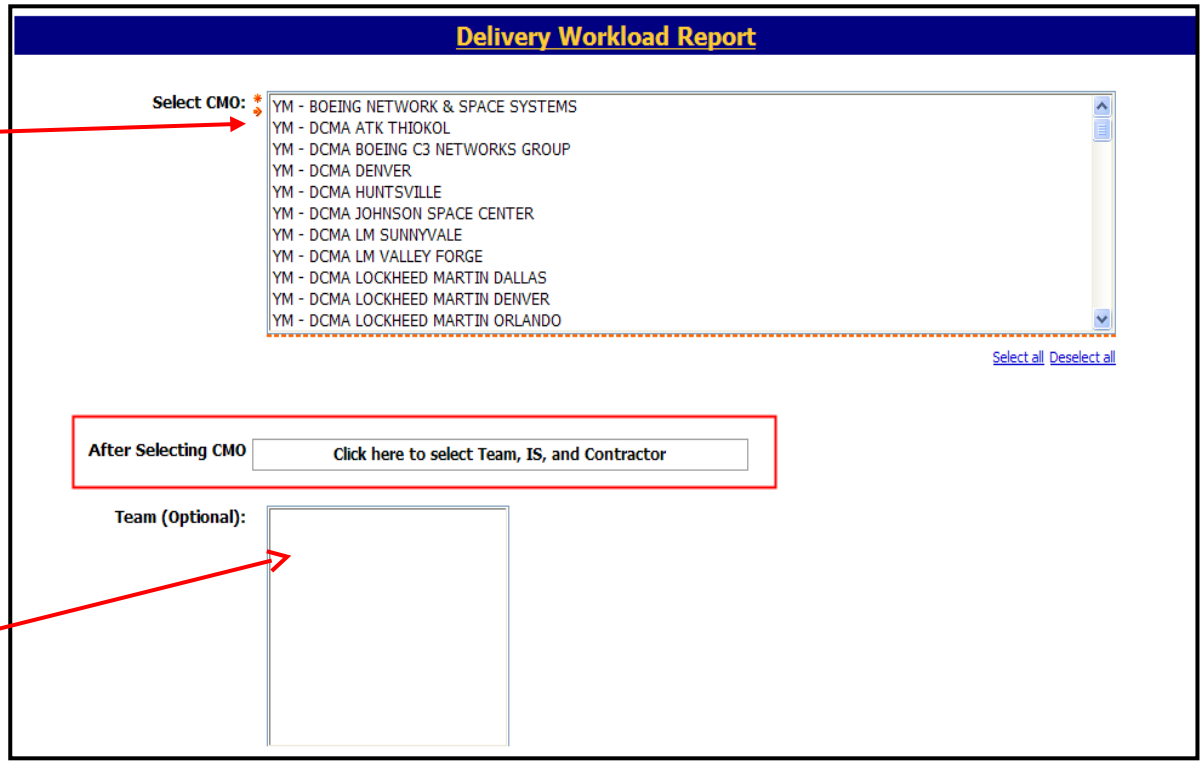
Graphic 1.1.3.1: eTools Reports Page

Setting Report Filters

After clicking the report type and view format, the report filter page appears. This page allows you to select specific criteria's for filtering the data you will see on your report.

Filter common elements:

- Fields with an * are required
- A red arrow will appear next to required lists prompting users to make a selection
- Clicking the **Select all** link selects all of the items in the list
- Clicking the **Deselect all** link deselects all of the selected items from the list
- It is recommended **NOT** to select all items for "Optional" lists as it may cause an error or take time to process
- Dynamic lists are not populated until data in a prior list is selected and the cascading prom Click here to select Team, IS, and Contractor example, the Team list is not populated until a CMO is selected and the button is clicked.

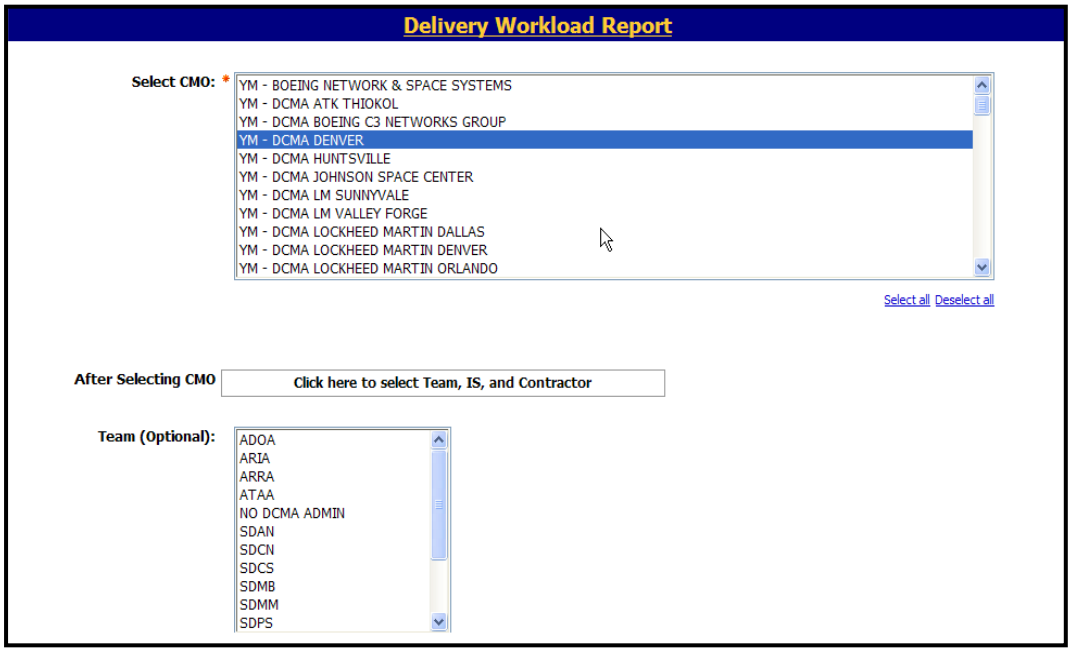

Delivery Workload Report
Select CMO:
YM - BOEING NETWORK & SPACE SYSTEMS
YM - DCMA ATK THIOKOL
YM - DCMA BOEING C3 NETWORKS GROUP
YM - DCMA DENVER
YM - DCMA HUNTSVILLE
YM - DCMA JOHNSON SPACE CENTER
YM - DCMA LM SUNNYVALE
YM - DCMA LM VALLEY FORGE
YM - DCMA LOCKHEED MARTIN DALLAS
YM - DCMA LOCKHEED MARTIN DENVER
YM - DCMA LOCKHEED MARTIN ORLANDO
Select all Deselect all
After Selecting CMO
Click here to select Team, IS, and Contractor
Team (Optional):

Graphic 1.1.3.2: Report Filters

Filtering a Report

The report will have more specific data the more filters you select.

How to Filter a Report (Graphic 1.1.3.3)	
1.	*Select* the **Filters** you want to apply by *choosing* an **item** from the drop-down menu.
2.	*Click* on the **Finish** button**.**



Graphic 1.1.3.3: Selecting Report Filters

Topic Three – Running Pre-Defined Reports

Viewing Your Completed Report

All Reports can be run in a similar process as the steps illustrated in the previous slides.
The results will look similar to those in Graphic 1.1.3.4

Delivery Workload Report

Report Run On:Jan 8, 2009

CMO	TEAM	IS	CONTRACTOR	CAGE	BUYING ACTIVITY	CONTRACT NUMBER	PROD SURV CD	SURV CRITICALITY CD	CLIN	DELIVERY SCHEDULE DATE	EST DATE IND	SCHEDULE DAYS LATE	DLVY SCHED QTY	SHI
YM - DCMA DENVER	ATAA	NFA	KACHEMAK RESEARCH DEVELOPMEN (1QXJ1)	'1QXJ1	325 CONS/CC (5V)	FA481906C0012	2	Blank	'0001					
YM - DCMA DENVER	ATAA	NFA	KACHEMAK RESEARCH DEVELOPMEN (1QXJ1)	'1QXJ1	325 CONS/CC (5V)	FA481906C0012	2	Blank	'0003					
YM - DCMA DENVER	ATAA	NFA	KACHEMAK RESEARCH DEVELOPMEN (1QXJ1)	'1QXJ1	325 CONS/CC (5V)	FA481906C0012	2	Blank	'0004					
YM - DCMA DENVER	ATAA	NFA	KACHEMAK RESEARCH DEVELOPMEN (1QXJ1)	'1QXJ1	325 CONS/CC (5V)	FA481906C0012	2	Blank	'1423DD					
YM - DCMA DENVER	ATAA	NFA	KACHEMAK RESEARCH DEVELOPMEN (1QXJ1)	'1QXJ1	325 CONS/CC (5V)	FA481907C0011	2	Blank	'0001	Aug 31 2011	A	-965	1	
YM - DCMA DENVER	ATAA	NFA	KACHEMAK RESEARCH DEVELOPMEN (1QXJ1)	'1QXJ1	325 CONS/CC (5V)	FA481907C0011	2	Blank	'0003	Aug 31 2011	A	-965	1	

Graphic 1.1.3.4: Report Results

Module One Review

Module One Covered the Following Topics:

Topic One	How to Access Pre-Defined Reports
Topic Two	Report Formats
Topic Three	Running Pre-Defined Reports